



STATE OF IDAHO
OFFICE OF THE STATE CONTROLLER
Brandon d Woolf

Dear Friends,

As Idaho's State Controller, it's my responsibility to help our government become more efficient, more transparent, and more responsive to our citizens' needs. This year's Idaho State Controller's Payroll Conference represents one step we are taking to achieve these goals.

We've structured this year's conference to help you learn about the latest payroll resources, regulations, and procedures; share best practices and solutions with peers from across government; and inspire excellence through new ideas, relationships, and knowledge. To meet these ends we have recruited top-notch instructors, and assembled an outstanding curriculum.

Thank you for being part of this year's conference, and thank you for your service to the people of Idaho.

Sincerely,

A handwritten signature in blue ink that reads "Brandon D Woolf". The signature is stylized and fluid.

Brandon D Woolf
Idaho State Controller

Idaho State Controller's 2013 Payroll Conference

Agenda

8:00 am	Registration Check-In
8:30 am	Idaho State Controller, Brandon Woolf – Welcome
8:40 am	Division of Human Resources, <i>"News from the Division of Human Resources"</i>
9:30 am	Division of Financial Management, David Fulkerson, <i>"Economic Outlook and Budget Update"</i>
10:15 am	Morning Break
10:30 am	Legislative Services, Jared Tatro, <i>"Wage and Salary - Personnel Cost Reconciliation"</i>
11:20 am	Office of Group Insurance, Emily Figart, <i>"State of Idaho, Office of Group Insurance Overview"</i>
12:00 pm	Lunch Break
1:00 pm	Idaho State Controller, Brandon Woolf
1:10 pm	PERSI, Mike Mitchell, <i>"New Employee Orientation"</i>
2:00 pm	Nationwide, John Lamm, <i>"Idaho Roth 457 Plan"</i> PERSI, Don Drum, <i>"401K"</i> State Treasurer's Office, Christie Stoll and Travis Schaat, <i>"Idaho College Savings Plan"</i>
2:45 pm	Afternoon Break
3:00 pm	State Controller's Office, Brian Benjamin, <i>"FMLA and ADA"</i>
3:50 pm	Idaho Court of Appeals, Judge David W. Gratton, <i>"Ethics in Public Service"</i>
4:30 pm	End of Conference



Brandon D. Woolf, Idaho State Controller

Starting at the State Controller's Office in 1997 as an intern, Brandon D Woolf rose through the agency's ranks serving as a training specialist in the office's Division of Statewide Payroll, bureau chief, division administrator over Statewide Payroll, deputy chief of staff, and chief of staff. After Donna Jones' retirement in October of 2012, Governor C.L. "Butch" Otter tapped Mr. Woolf to serve out the remainder of Ms. Jones' term, appointing him as Idaho's 21st State Controller on October 15, 2012.

Mr. Woolf graduated from Utah State University in 1997 after earning a Bachelor of Arts in Political Science with a minor in Dutch. In 2006, while working full time at the State Controller's Office, he earned a Master of Business Administration from Boise State University. He and his wife Janalee, who is from Preston, Idaho, married in 1994 and have three children: Brittney, Justin, and Bailey. Mr. Woolf and his family are actively involved in their church and its youth groups. He's also an avid runner and speaks, reads and writes Dutch fluently.



Vicki Tokita, Administrator, Division of Human Resources

Vicki was appointed in 2011 by Governor Otter to the position of DHR Administrator. She has 36 plus years of state service and 18 years in Human Resources.

Terri DeNinno, Chief Learning Officer, Division of Human Resources

Terri has been with the state for one year. She has 24 plus years of corporate training experience.

Michelle Peugh, Human Resources Consultant, Division of Human Resources

Michelle has nine months of state service. She has eight plus years private sector human resource experience.

Topic: News from the Division of Human Resources



David Fulkerson, State Financial Officer, Division of Financial Management Topic: Economic Outlook and Budget Update

David Fulkerson has been with the Idaho Division of Financial Management (DFM) since July 2003. David currently serves as the DFM Deputy Administrator and as the State Financial Officer. Additionally, David serves as the DFM representative on the State Fiscal Policy Advisory Committee, the Idaho Credit Rating Enhancement Committee, and the Idaho Technology Authority.

His responsibilities include overseeing the agency financial management for the Governor's Office, Lt. Governor's Office, DFM, Division of Human Resources, Office of Drug Policy, Office of Species Conservation, and the State Appellate Public Defenders Office. He is also responsible for managing the Statewide Cost Allocation Plan and the Cash Management Agreement between the State of Idaho and the Federal Government.

In 2011, David was appointed by Idaho Governor C.L. "Butch" Otter as Interim Director of the Idaho Department of Commerce which leads the state's economic development, trade, and tourism efforts. In 2012 he also served as the Interim Director of DFM.



**Jared Tatro, Budget Policy Analyst,
Legislative Services Office
Topic: Wage and Salary – Personnel Cost
Reconciliation**

Jared began working for the Legislature in 2007 as a program evaluator and for the past year has served as a budget and policy analyst. Jared assists legislators in understanding the budget process and the budgetary requests of his assigned agencies, the Millennium Fund Committee, and the Statewide Cost Allocation process. Most recently Jared has been the lead on revamping the wage and salary reconciliation form for state agencies.



**Emily Figart, Employee Benefits Specialist,
Office of Group Insurance
Topic: State of Idaho, Office of Group Insurance
Overview**

Emily acts as the liaison for active employees with the insurance carriers. She is responsible for assisting with claim issues, premium reconciliation, payments and refunds for active employee medical, dental and FSA plans. Also, she researches coverage terminations and provides explanations and/or resolutions. Emily also provides training for agency HR & Payroll staff as well as attending Employee Benefit Fairs around the State. Emily has worked for the Office of Group Insurance for 11 years.



Mike Mitchell, Training Specialist, Public Employee Retirement System of Idaho

Topic: New Employee Orientation

Mike joined PERSI in October 2006 as a Training Specialist. Holding NASD Series 7 General Securities, Series 66 Investment Adviser Representative, and Life Insurance licenses, uniquely qualified him to educate PERSI members about their benefits and the value of retirement planning. Mike was instrumental in incorporating financial planning concepts into PERSI's retirement workshops.

Before joining PERSI, Mike spent seven years in the financial services arena as a financial adviser in private practice, a licensed personal banker, and as a paraplanner with an independent financial planning firm. His experience also includes a successful career in sales and marketing management for the transportation, retail, and insurance industries. He holds a BA in Finance from California State University Fullerton.



Don Drum, Executive Director, Public Employee Retirement System of Idaho

Topic: PERSI

In October 2008, Don became the Executive Director of the Public Employee Retirement System of Idaho (PERSI), a \$12 billion fund with over 129,000 members. PERSI is a statewide retirement system providing retirement services to cities, other local governments, teachers, police/fire and state employees. Don has worked to upgrade member communications, improve customer service, and is now working on upgrading the membership information system that supports all PERSI activities. Don continues to work closely with the Governor's staff and the legislature to address any and all concerns related to the PERSI benefit.

Prior to his appointment as director, Don served as PERSI's deputy director for 2½ years. Before joining PERSI, Don held various management positions with the Idaho Department of Corrections. He was also the owner of a small accounting firm. He graduated from Boise State University with a Bachelor's Degree in Accounting.



John Lamm, Program Director, Nationwide

Topic: Idaho Roth 457 Plan

John is a native of Idaho and a graduate of Boise State University with a degree in Business Administration. His entire career has been in the Financial Services Industry working specifically with Public Employees. John has been with Nationwide (Idaho's 457 Third Party Administrator) for over 20 years. He currently serves as Program Director for Nationwide in Idaho, Montana, Utah and Alaska.



Christine Stoll, Executive Director, IDEal- Idaho College Savings Program

Topic: Idaho College Savings Plan

Christine received her Baccalaureate degree in Psychology, and her Master's degree in Instructional Performance and Technology from Boise State University.

Christine has spent the majority of her career dedicated to the mission of assisting Idahoans in making successful education and career decisions by providing comprehensive career information, resources, and services. She spent thirteen years at the Idaho Career Information System-CIS, where eight of those years she served as the Administrator. Currently she is serving as the Executive Director for IDEal- Idaho's College Savings Program, which is a division within the Idaho State Treasury. Her passion and interest in the field of career development and helping families save for the goals of postsecondary education is fueled by the unique challenges that Idaho's growth has provided including the changing expectations for families, education and business. Christine views these changes as important driving forces for future leadership and development of products and services that will serve the career development and financial planning needs of all Idahoans. Christine is

active in the career development field and enjoys traveling, gardening, and playing outdoors.



**Travis Schaaf, Special Program Administrator,
State Treasurer's Office**

Topic: Idaho College Savings Plan

Travis recently started with the Treasurer's Office in May 2013 as the Special Program Administrator. He is a Certified Public Accountant who works with the Treasury's Investment Group on various programs such as the Idaho College Savings Program, Idaho Bond Bank Authority, Idaho School Bond Guarantee and Unclaimed Property.

Before working for the Treasurer's Office, Travis spent two-and-a-half years in public accounting. He audited a variety of clients in various sectors including private, not-for-profit and governmental entities. He also worked three tax seasons and was exposed to a wide variety of business, entity and individual returns.

Travis holds bachelor's degrees in accounting and business management from Brigham Young University-Idaho.



**Brian Benjamin, Deputy Chief of Staff,
State Controller's Office**

Topic: FMLA and ADA

Brian Benjamin currently serves as the Deputy Chief of Staff and counsel for the Idaho State Controller's Office. In addition to serving as counsel for the State Controller's Office, Brian assists the State Controller in fulfilling his statutory and constitutional duties on the Idaho State Board of Examiners, Idaho State Land Board, and as the Social Security Administrator for the State of Idaho.

Brian received his Bachelor of Science in Business Finance in 1993 from the University of Idaho and his Juris Doctor in 1996 from the University of Idaho, College of Law. Prior to joining the State Controller's Office, Brian worked as a Lead Deputy Attorney General in the Attorney General's Office for over ten years in the Civil Litigation Division, where he focused primarily on public employment and personnel law. He has spent much of his career advising state agencies in personnel matters and representing state agencies in contested cases before the Idaho Personnel Commission, Idaho Human Rights Commission, EEOC and state and federal courts. Brian also practiced law in the private sector with the

Lewiston law firm of Randall, Blake & Cox, P.A. where he practiced general civil and criminal litigation. Brian is licensed to practice in Idaho and is an active member of the Employment and Labor Law Section and Government and Public Sector Lawyers Section of the Idaho State Bar.



Honorable Judge David W. Gratton, Idaho Court of Appeals

Topic: Ethics in Public Service

Judge Gratton was born and raised in Emmett, Idaho. He attended Boise State University, graduating in 1982 with a B.A. in Political Science. Judge Gratton received a Juris Doctor from the University of Idaho, College of Law in 1985.

He served as an intern law clerk for Ninth Circuit Judge J. Blaine Anderson in 1984 and as a law clerk to United States District Court Judge Harold L. Ryan from 1985 to 1987. Judge Gratton joined the law firm of Evans Keane, LLP in 1987, becoming a partner in 1993, until his appointment to the Idaho Court of Appeals in 2009, by Governor C.L. "Butch" Otter.

Judge Gratton and his wife, Robin, have three children, John (deceased), Kevin and Breanne.
